

Appendix D2: New Customer – New Case – 3rd Party

<u>Logical Field Name</u>	<u>Smartsript Question Name</u>	<u>Question Text</u>	<u>Pick Applet</u>	<u>Notes</u>	<u>Required Field?</u>
N/A	Master Greeting	* Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is [Agent Name]. Is this your first time calling our office?	N/A		Y
N/A	SR Master Link	[NOTE: Press Enter.]	N/A		N
Original Issue Summary	Case Summary	* I'm glad you called. How may I help you today? [NOTE: Type caller's problem.]	N/A		Y
Version	Case Main Category	* [NOTE: Select Issue Category.]	SR Area Pick Applet		Y
Severity	Case Sub Category	* [NOTE: Select Issue Sub Category.]	SR Sub-Area Hierarchical Pick Applet		Y
Abstract	Case Exp Summary	[NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	N/A		N
Customer Category	Case Exp Category	[NOTE: Select Expectation Category.]	OCTS Contact Type Pick Applet		N
Resolution Code	Case Exp Sub Category	[NOTE: Select Expectation Sub Category.]	SR Sub-Area Hierarchical Pick Applet		N
Source	Case Referred by	How did you hear about our office?	SR Source Pick Applet		Y

N/A	KC Pilot - Contact Intro	OK, I think I have an understanding of your problem. I need to gather some information about yourself if that's alright. [Hit Enter to continue]	N/A		N
Account	Cntc SSN	* [NOTE: The following questions are about the borrower. If the caller is a third party, use his/her.] Now I need to gather some profile information about you. May I have your social security number?	N/A		Y
First Name	Cntc First Name	* May I have your first name?	N/A		Y
Last Name	Cntc Last Name	* May I have your last name?	N/A		Y
Suffix	Cntc Name Suffix	[NOTE: Select Jr., Sr., III, etc.]	OCTS Contact Type Pick Applet		N
Middle Name	Cntc Middle Name	What is your middle name or initial?	N/A		N
M/M	Cntc Name Prefix	[NOTE: Select name prefix.]	OCTS Contact Type Pick Applet		N
Alias	Cntc Name Preferred	Do you have a preferred name or nickname?	N/A		N
Birthdate	Acct Birthdate	May I have your birthdate? [NOTE: mm/dd/yyyy]	N/A		N
Address	Cntc Street	What is your street address?	N/A		N
Contact City	Cntc City	City?	N/A		N
Contact State	Cntc State	State?	OCTS Contact Type Pick Applet		N
Zip Code	Cntc Zip	Zipcode?	N/A		N
Contact Country	Cntc Country	[NOTE: Select country.]	OCTS Contact Type Pick Applet		N

Assistant	Cntc Method	* What is the best way for our office to contact you?	OCTS Contact Type Pick Applet		Y
Home Phone #	Cntc Home Phone	Home Phone?	N/A		N
Work Phone #	Cntc Work Phone	Work Phone?	N/A		N
Fax Phone #	Cntc Fax	Fax Number?	N/A		N
Cellular Phone #	Cntc Mobile Phone	Mobile Phone?	N/A		N
Country Code	Cntc Country Code	[NOTE: Enter country code.]	N/A		N
Email Address	Cntc Email1	Email address?	N/A		N
Secondary Email	Cntc Email2	Secondary email address?	N/A		N
Hrs Avail	Cntc Availability	What is the best time of day to contact you?	N/A		N
Time Zone	Cntc Time Zone	[NOTE: Select time zone. Confirm with caller.]	OCTS Contact Type Pick Applet		N
N/A	Loan Lead in	OK, I'd like to get a little more information on your loan please.	N/A		N
Product	Loan Type	* What type of loan do you have?	SR Internal Product Pick Applet		Y
Servicing Agency	Loan Servicer	* Who holds your loan?	OCTS Contact Type Pick Applet		Y
Loan Status	Loan Status	* What is the current status of your loan?	OCTS Contact Type Pick Applet		Y
N/A	SR Resolution of Problem	Hold for a moment while I search for further information on [Area] in the database.	N/A		N

N/A	SR Decision Issue	[ExistText][Explanation].	N/A		N
N/A	SR Decision Issue How to Discuss	[ExistText] [Discuss]	N/A		N
N/A	Goodbye Q0	[NOTE: Are you speaking with the borrower?]	N/A		Y
N/A	Goodbye Q5	[NOTE: Press Enter twice.]	N/A		N
N/A	SR TEST	[NOTE: Press Enter to continue.]	N/A		N
N/A	SR Add a Contact 1	NOTE: Press F2. Using the borrower's SSN, [SSN], add the third party contact information.	N/A		Y
N/A	Goodbye Q1	[NOTE: Can you resolve the issue now?]	N/A	If "NO", goto Goodbye Q3. If "YES", goto Goodbye Q2.	Y
N/A	Goodbye Q3	Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.]	N/A		N
N/A	Goodbye Q2	[NOTE: Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. Press Enter twice to end the script.]	N/A		N

